

AMENDMENTS TO THE CLAIMS

This listing of claims will replace all prior versions, and listings, of claims in the application:

1. (Currently amended) A system for managing property tax information for a plurality of property tax accounts:

a data storage device;

an output device;

a processor programmed to:

maintain in the storage device a database of property tax data including a plurality of account records, each account record including an account identifier, a state identifier and a jurisdiction identifier, wherein the jurisdiction identifier is associated with a local property tax assessor, treasurer or collector that is not a local property tax appropriating district;

maintain in the storage device a plurality of tax rule template records, each tax rule template record including a template tax year identifier, a template state identifier, a template jurisdiction identifier and one or more property tax calculation parameters;

receive an input requesting a report of information for a specified account record,

automatically retrieve a tax rule template from the stored plurality of tax rule templates based on the tax year identifier, the state identifier and the jurisdiction identifier of the specified account and the template tax year identifier, the template state identifier and template jurisdiction identifier;

generate the requested report using the property tax calculation parameters from the retrieved template record, and

output the requested report to the output device.

2. (Previously presented) The system of claim 1 wherein the plurality of templates includes a tax calculation template having property tax calculation parameters for computing property tax amounts.

3. (Previously presented) The system of claim 1 wherein the plurality of templates includes a valuation template having property tax calculation parameters for computing property tax valuation rules.

4. (Previously presented) The system of claim 1 wherein the plurality of templates includes an appeals template having property tax calculation parameters for computing property tax appeal information.

5. (Previously presented) The system of claim 1 wherein the plurality of templates includes an installment template having property tax calculation parameters for computing installment payment rules.

6. (Previously presented) The system of claim 1 wherein the plurality of templates includes a revaluation template having property tax calculation parameters for computing a revaluation cycle.

7. (Previously presented) The system of claim 1 wherein the plurality of templates includes a tax year template having property tax calculation parameters for defining the beginning and end dates of a tax year.

8. (Previously presented) The system of claim 1 wherein the plurality of templates includes a label template having property tax calculation parameters for defining naming conventions for a state or jurisdiction.

9. (Previously presented) The system of claim 1 wherein the processor programmed to automatically retrieve a template from the stored templates is programmed to search the stored templates for a template having a template tax year identifier, template state identifier and a template jurisdiction identifier that match the first of:

the tax year identifier of the specified account, the state identifier of the specified account, and the jurisdiction identifier of the specified account; or

the tax year identifier of the specified account and the state identifier of the specified account; or

the tax year identifier of the specified account.

10. (Currently amended) A method for managing property tax information for a plurality of ~~taxing~~ jurisdictions, the method comprising:

maintaining in a computer storage device a database of property tax data including a plurality of account records, each account record including an account identifier, a tax year identifier, a state identifier and a jurisdiction identifier, wherein the jurisdiction identifier is associated with a local property tax assessor, treasurer or collector that is not a local property tax appropriating district;

maintaining in the storage device a set of parameter options, wherein each parameter option includes a parameter for making a property tax calculation in one or more of the plurality of jurisdictions and the set of parameter options includes all of the parameters required for making a property tax calculation for any of the plurality of ~~taxing~~ jurisdictions;

storing in the storage device a plurality of tax calculation template records, each template record including data representing parameters selected from the stored set of parameter options;

linking the template record to at least one of a state record representing a state, a jurisdiction record representing a ~~taxing~~ jurisdiction within the state or a system master record;

maintaining in the storage device a computer program operable with a template record of the stored plurality of template records to make a property tax calculation for any of the jurisdictions comprising the plurality of jurisdictions;

receiving an input requesting a report of information for a specified account record,

automatically retrieving a template record from the stored plurality of template records based on the tax year identifier, the state identifier and the jurisdiction identifier of the specified account;

generating the requested report using the retrieved template record and the stored procedure, and

outputting the requested report to the output device.

11. (Previously presented) The method of claim 10 wherein the stored computer program is operable to retrieve a tax calculation template record from the plurality of stored template records and to calculate property taxes for the specified account record.

12. (Previously presented) The method of claim 10 wherein the stored computer program is operable to retrieve a valuation template record from the plurality of stored template records and to determine applicable valuation rules for the specified account record.

13. (Previously presented) The method of claim 10 wherein the stored computer program is operable to retrieve an appeals template record from the plurality of stored template records and to determine applicable procedures for the specified account record.

14. (Currently amended) The method of claim 10 wherein the stored computer program is operable to retrieve an installment template from the plurality of stored template records and to determine applicable installment payment rules for the specified account record.

15. (Previously presented) The method of claim 10 wherein the stored computer program is operable to retrieve a revaluation template from the plurality of stored template records and to determine applicable revaluation rules for the specified account record.

16. (Previously presented) The method of claim 10 wherein the step of maintaining in the storage device a plurality of templates includes maintaining a tax year template for defining the beginning and end dates of a tax year.

17. (Previously presented) The method of claim 10 wherein the step of maintaining in the storage device a plurality of templates includes maintaining a label template for defining naming conventions for a state or jurisdiction.

18. (Previously presented) The method of claim 10 wherein the step of automatically retrieving a template from the stored templates includes searching the stored templates for a template that matches the first of:

a tax year applicable to the selected account, the state in which the selected account is located, and the jurisdiction associated with the specified account; or

a tax year applicable to the selected account and the state in which the selected account is located; or

a tax year applicable to the selected account.

19. (Currently amended) In a system for managing property tax information for a plurality of property tax accounts, a computer-readable medium having stored thereon:

a database of property tax data including a plurality of account records, each account record including an account identifier for identifying a property tax account of the plurality of

property tax accounts, a tax year identifier for identifying ~~the~~ a tax year applicable to the account, a state identifier for identifying ~~the~~ a state applicable to the account and a jurisdiction identifier for identifying a jurisdiction within the state applicable to the account, wherein the jurisdiction comprises a local property tax assessor, treasurer or collector that is not a local property tax appropriating district; and

a plurality of templates, each ~~tax rule~~ template including a template tax year identifier, a template state identifier, a template jurisdiction identifier and one or more property tax calculation parameters.

20. (Previously presented) The computer-readable medium of claim 19 wherein the plurality of templates includes a tax calculation template for calculating property tax amounts for property tax accounts.

21. (Previously presented) The computer-readable medium of claim 19 wherein the plurality of templates includes a valuation template for determine applicable valuation rules for property tax accounts.

22. (Previously presented) The computer-readable medium of claim 19 wherein the plurality of templates includes an appeals template for managing property tax appeal information for property tax accounts.

23. (Previously presented) The computer-readable medium of claim 19 wherein the plurality of templates includes an installment template for determining applicable installment payment rules for property tax accounts.

24. (Previously presented) The computer-readable medium of claim 19 wherein the plurality of templates includes a revaluation template for determining applicable revaluation rules for property tax accounts.

25. (Previously presented) The computer-readable medium of claim 19 wherein the plurality of templates includes a tax year template for defining the beginning and end dates of a tax year for property tax accounts.

26. (Previously presented) The computer-readable medium of claim 19 wherein the

plurality of templates includes a label template for defining naming conventions for a state or jurisdiction.

27. (Previously presented) The system of claim 1 wherein the account records comprise real estate parcel records.

28. (Previously presented) The system of claim 1 wherein the account records comprise personal property account records.

29. (Currently amended) A computer-readable medium having stored thereon:
a plurality of property records each comprising a real estate parcel record or a personal property account record, each property record including a parcel or account identifier, a tax year identifier representing a tax year applicable to the property record, a state identifier representing a state applicable to the property record and a jurisdiction identifier representing ~~a property taxing or assessing jurisdiction~~ a local property tax assessor, treasurer or collector applicable to the property record, wherein the local property tax assessor, treasurer or collector is not a local property tax appropriating district; and

a plurality of tax rule template records, each tax rule template record including a tax year identifier, a state identifier, a jurisdiction identifier and one or more property tax calculation parameters;

a table of tax year identifiers, state identifiers and ~~taxing~~ jurisdiction identifiers, the table linking each of the property records to one or more of the template records so that the linked property record and template records have the same tax year identifier and jurisdiction identifier; and

a set of computer program instructions operable with each of the tax rule template records to perform a property tax calculation for a property record selected from the plurality of property records, the program instructions using the property tax calculation parameters of the one or more template records linked to the selected property record;

whereby a property tax calculation can be performed for any property record of the plurality of property records regardless of the tax year, state and jurisdiction applicable to the property record.

30. (Previously presented) The computer-readable medium of claim 29 wherein the plurality of tax rule template records includes a plurality of tax calculation template records having property tax calculation parameters for computing a property tax amount.

31. (Previously presented) The computer-readable medium of claim 29 wherein the plurality of tax rule template records includes a plurality of installment template records having property tax calculation parameters for computing property tax installment payments.

32. (Currently amended) The computer-readable medium of claim 29 wherein the plurality of tax rule template records includes a plurality of appeal ~~process~~-template records having property tax calculation parameters for computing the property tax appeals information.

33. (Previously presented) The computer-readable medium of claim 29 wherein the plurality of tax rule template records includes a plurality of revaluation cycle template records having property tax calculation parameters for computing property tax revaluation cycles.

34. (Previously presented) The computer-readable medium of claim 29 wherein the plurality of tax rule template records includes a plurality of tax year template records having property tax calculation parameters for the beginning and ending dates of property tax years.

35. (Previously presented) The computer-readable medium of claim 29 wherein the plurality of tax rule template records includes a plurality of tax label template records having property tax calculation parameters for computing property tax labels and terminology.

36. (Previously presented) The computer-readable medium of claim 29 wherein the plurality of tax rule template records includes a plurality of valuation template records having property tax calculation parameters for computing property tax valuation rules.

37. (Previously presented) The computer-readable medium of claim 30 wherein each of the plurality of tax calculation template records includes a set of fields representing all of the parameters used by a plurality of jurisdictions that use different formulas to calculate property taxes on tax bills.

38. (Currently amended) The computer-readable medium of claim 31 wherein each

of the plurality of installment template records includes a set of fields representing all of the parameters needed for calculating installment payments according to installment payment methods used by a plurality of jurisdictions that use different installment payment methods to bill for property taxes.

39. (Currently amended) The computer-readable medium of claim 32 wherein each of the plurality of appeal ~~process~~-template records includes a set of fields representing all of the parameters needed for tracking appeal processes followed by a plurality of property tax assessing jurisdictions that have different appeal processes.

40. (Previously presented) The computer-readable medium of claim 33 wherein each of the plurality of revaluation cycle template records includes a set of fields representing all of the parameters used for property revaluation by a plurality of property tax assessing jurisdictions that use different revaluation methods.

41. (Previously presented) The computer-readable medium of claim 34 wherein each of the plurality of tax year template records includes a set of fields representing all of the parameters used for defining the beginning and end dates of a tax year by a plurality of jurisdictions that use different tax years for billing for property taxes.

42. (Previously presented) The computer-readable medium of claim 35 wherein each of the plurality of tax label template records includes a set of fields representing all of the terms used for preparing tax bills and assessments by a plurality of jurisdictions that use different terms in bills for property taxes.

43. (Previously presented) The computer-readable medium of claim 36 wherein each of the plurality of valuation template records includes a set of fields representing all of the tax valuation rules followed by a plurality of property tax assessing jurisdictions that use different valuation rules.

44. (Currently amended) In a computer system having a graphical user interface including a display and a selection device, a method of providing and selecting parameters for making property tax calculations for a property tax account for taxes to be billed or assessed by

one of a plurality of jurisdictions, the method comprising:

retrieving a set of parameter options, each parameter option representing a parameter required for making a property tax calculation for taxes to be billed or assessed by one or more of the plurality of jurisdictions, wherein each of the plurality of jurisdictions is a property tax assessor, treasurer or collector that is not a local property tax appropriating district;

displaying the parameter options on the display;

receiving from the selection device one or more signals indicating the selection of parameters from the set of parameter options; and

in response to the parameter selection signals, storing in a database the plurality of selected parameters in a tax rule template record.

45. (Previously presented) The method of claim 44 wherein the set of parameter options includes an option of using a true value tax rate or using the true value tax rate and an other value tax rate in making the property tax calculation.

46. (Previously presented) The method of claim 44 wherein the set of parameter options includes an option of using either of market value or assessed value in making the property tax calculation.

47. (Previously presented) The method of claim 44 wherein the set of parameter options includes an option of using an equalization ratio in making the property tax calculation.

48. (Previously presented) The method of claim 44 wherein the set of parameter options includes an option of applying the equalization ratio as a percent or as a rate.

49. (Previously presented) The method of claim 44 wherein the set of parameter options includes an option of using an assessment ratio in making the property tax calculation.

50. (Previously presented) The method of claim 49 wherein the set of parameter options includes an option of applying the assessment ratio as a percent or as a rate.

51. (Previously presented) The method of claim 44 wherein the set of parameter options includes an option of applying the assessment ratio as one assessment ratio against the entire true value market value of land and improvements or applying the assessment ratio as a

first ratio for land and a second ratio for improvements.

52. (Previously presented) The method of claim 44 wherein the set of parameter options includes an option of using a district tax rate in making the property tax calculation.

53. (Previously presented) The method of claim 52 wherein the set of parameter options includes an option of applying the district tax rate as a percent or as a rate.

54. (Currently amended) The method of claim 44 further comprising:
retrieving a set of linking options, each linking option representing one of a system master record, a state record or a record for a ~~taxing~~-jurisdiction within a state;
displaying the set of linking options;
receiving from the selection device a linking selection signal indicating the selection of a linking option; and
in response to the linking selection signal, linking the stored tax calculation template to the system master record, state record or jurisdiction record represented by the linking option.